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## ABSTRACT

Advice is given to course teams from the Social Sciences faculty at the Open University in England on the proper use of educational consultants. Practical suggestions on the selection of appropriate tasks for consultants and of consultants for tasks are followed by suggestions on briefing, contracting, and maintaining liaison with consultants. Included are sections on: choosing the right job; choosing the right person; getting the contract right; briefing and liaison procedures; unit writing for authors; length of finished units; introductory notewriting; developing student materials; closing checks; assessment; and copywriting. Developing prearranged schedules and policies towards using educational consultants can save hours of valuable time. Examples of briefing materials used for a specific course offered in conjunction with educational consultants at the Open University are included. One reference is listed. (DC)

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## HOW TO USE CONSULTANTS SUCCESSFULLY

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TO THE EDUCATIONAL RESOURCES  
INFORMATION CENTER (ERIC)."

### Abstract

These notes summarise the advice I give to course teams in the Social Sciences Faculty on using consultants. Advice on the selection of appropriate tasks for consultants and of consultants for tasks, is followed by advice on how to brief, contract and liaise with consultants. Examples on briefing materials used on D204 are included.

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Reprint

CD2

Correspondence texts/Critical Readers/Developmental testing/External Assessment

# HOW TO USE CONSULTANTS SUCCESSFULLY

These notes summarise the advice that I give to course teams in the Social Sciences Faculty. I know that other members of IET would give rather different advice on some topics and that I would not make the same suggestions to teams in other faculties. The notes are meant as temporary records of the way we do things and I expect to redraft them at intervals to include examples of innovations, to take account of your comments or as I continue to learn and to change my views. These notes form part of a series for Social Science course teams<sup>1</sup>, the others can be obtained from me, Judith Riley (x3546).

There are plenty of examples of disastrous consultants, who produce too late, or not at all, or who offer totally unsuitable material at the very last minute. However, some people in the Faculty have made it work - these notes draw attention to the factors that seem to explain such successes.

"The consultants' units were the salvation of D204, because they were on time and many of the internal units were late. They were at least as good; it took less effort to co-ordinate consultants' units because they did what was asked of them."

## **CHOOSE THE RIGHT JOB**

- Principles: - offer relatively self-contained jobs;
- avoid tasks that will be very strange to consultants;
  - avoid offering jobs which no-one on the team wants to do because they're ill-thought out, maybe impossible!

So, don't just think of putting whole units out, consider the possibilities of:

- articles for readers;
- instructions for projects or summer schools;
- broadcasts and their notes;
- critical reading of drafts, (e.g. D302);
- assessment material, (e.g. CMAs for the maintenance of DT201);
- subject reviews to be transformed into units by OU staff;
- specific parts of units;
- special manuals, (e.g. statistical techniques manual D204).

## **CHOOSE THE RIGHT PERSON**

- Principles: - best if well known to a variety of team members, in order

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- avoid the very eminent who may be too busy and too inflexible to meet our needs;
- avoid the very inaccessible, especially if they plan to go abroad!
- avoid those who can only do the work in one brief period even if this fits the current schedule - its likely to change!
- best if are interested in teaching as well as subject matter itself, some research staff have had particular trouble in writing course material of an appropriate level of difficulty, some part-time OU tutors have been good buys;
- best if they can do several jobs for you later on e.g. write a bit and if that's OK also use them for critical reading, assessment and tutoring or tutor briefing.

## GET THE CONTRACT RIGHT

Be very careful about the formal contract document, which is sent by Christodoulou, and about any letters sent by the course team. There have been problems when these have been misinterpreted by consultants.

You should be very clear about:

- the schedule (AD208 successfully asked consultants to send in work months ahead of the internal schedule);
- the number of drafts and the nature of each, including who types them;
- the idea of team discussion and responsibility, pointing out any external assessors or developmental testing;
- expected attendance at meetings and expenses;
- what is required in addition to the obvious e.g. a unit means text and assessment material, or a broadcast means writing the script and the broadcast notes.

## LIAISON IS VERY IMPORTANT

I think that briefing and liaison is the single most important factor in explaining success or failure. It seems to be important to convey four perspectives:

- how the need for the piece of work arose;
- its relation to the rest of the course materials;
- how it is to be used by students;
- how the course team will decide whether the consultant has done the work adequately.

Practically, I suggest you:

- have a course outline, a document recording the main decisions on course content and structure, the materials that are planned, policies agreed on assessment etc;
- have unit summaries (D204 used a standard set of headings for these);
- give every consultant a liaison person who does his detailed briefing and acts as general friend and postbox, this person must be able to explain the OU system and help the consultant teach-at-a-distance;
- get consultants to as many team meetings as possible, preferably at least one where they hear someone else's unit/broadcast or whatever discussed and one when their own product is on the agenda. An earlier briefing meeting could also save liaison time;
- avoid overwhelming them with unnecessary paper!

## LIAISON ON D204

D204 had 11 consultants and I acted as liaison person for them all, with the chairmen of their section of the course taking overall responsibility.

I began by telephoning to establish a personal contact. I explained my role and offered to send them briefing material and to meet them face-to-face (no-one refused, perhaps because I offered to travel to somewhere mutually convenient. In fact I only had to go far to 2, I met all the rest while they were in London for other purposes).

I sent:- the course outline;

- a summary proposal for their unit (written with the consultants' help in some cases);
- unit summaries for related units (the form of these summaries is described in my notes "Early Planning");
- a single example of a 'good' OU unit (selected as being in a similar style to what the team wanted for D204).

At our meeting we had plenty to talk about:

- what was expected of him;
- how to achieve that;
- any problems he envisaged.

I emphasised the difference between a unit and writing an article, stressing the idea of interacting, getting the student to think actively. We discussed how much time the student could be expected to give and how quickly he could be expected to work. I tried to make each consultant talk about how he felt about these ideas and to translate them into his own terms and begin thinking up ideas e.g. for SAQs or CMAs. Most seemed convinced it was a different job from what they were used to and that they were keen to learn this new skill. I left them with some simple reminder notes (below) and a sheet of 'notes for typists'. N.B. These notes are specific to D204 and would need changing a bit before being used for any other course, e.g. you may have developmental testing and you're unlikely to be able to offer two-colour printing.

#### D204 Notes on unit writing for authors

## **DIFFERENCES BETWEEN DRAFTS**

### Unit summaries

An outline of basic planning information including proposed teaching strategy, copies for all the units are available to all members of the course team and all consultants.

### First drafts (D1)

These first drafts should be full drafts i.e. including contents pages, various forms of guidance to students and exercises and questions in the text, CMAs, TMAs and estimates of workload, and any associated offprints. Copies laid out and typed according to the 'notes for typists', are circulated to all OU members of the course team and are available to consultant authors as necessary.

### Second drafts (D2)

Completed by the author on the basis of discussion of the first draft by members in that Section of the course. Any items missing from the first draft must be included at this stage as this is the draft that goes to our four tutor-testers. This draft is also circulated to the whole course team. N.B. First drafts may go to tutor testers if they are complete.

### Final drafts (D3)

Completed by the author, on the basis of the tutor-testers' comments and any other reactions received to the second draft. It is almost impossible and very expensive to make any changes after this draft has been handed over to our editor. The editor may have suggestions to improve the expression and presentation at this stage. This draft will probably only be circulated to selected members of the course team.

The production of these four stages of each unit is shown on the course schedule. Any departure from this schedule usually makes extra work for other people, prevents your unit being properly integrated and referred to by other authors, and reduces the amount of thought and help that can be given to you by other members of the team.

## LENGTH OF UNITS

We promise our students that they can complete their studies in 10-11 hours per week. After allowing for tutorials, preparing for and listening to broadcasts, referring to the Techniques Manual, preparing and writing TMAs and completing CMAs, there is about seven hours left to study your unit.

This seven hours must include not only time to read the text once, but also:

- time to think about each section and re-read it and make notes, as is necessary to achieve the level of understanding that is expected;
- time to study all associated set reading;
- time to complete all SAQs and any exercises;
- time to study any graphs, tables, maps or illustrations.

N.B. There seems to be four factors that exert a major influence on reading speed:

- conceptual difficulty and density;
- level of understanding and recall required;
- style of writing; (especially long sentences with many subordinate clauses, and long words, technical terms or unfamiliar English vocabulary);
- sheer number of words.

Although we cannot specify a simple word limit on units, on grounds of cost we must limit units to forty pages of the final format plus four pages of supplementary material for assessment questions and up to twelve pages for offprints. This suggests a limit of about 15,000 words and eight pages of illustrations for the main text, and up to 3,500 for additional reading of any articles or parts of the set books that you want the student to read. 15,000 words is represented by about 60 pages of double-spaced typing on an A4 draft.

## INTRODUCTORY NOTES

The course team have agreed that all units should start with a study guide and a list of key questions or objectives.

The study guide is thought of as a brief paragraph indicating all the items of the week's work, including broadcasts, and how to approach these and balance effort between them. If any of the items are likely to change from year to year (e.g. offprints moving from Supplementary Material to the Reader in 1978) these can be specified annually in the Course Guide.

Key questions or objectives come next, to get the student motivated and oriented to the unit, so that he starts work on it with a clear purpose in mind. The choice of whether to provide open questions which the unit is designed to discuss, or more specific objectives which are to be achieved, is yours, and will depend on what approach you prefer the student to take, questioning or looking for answers. Remember that you are trying to teach certain "skills" (See Course Outline) as well as "knowledge".

## THROUGHOUT THE TEXT

A unit is not an academic paper.

To most of us, writing in a university means writing for publication in an academic journal, that is writing to contribute to knowledge, to report on our research and to establish our own careers! Many of the principles one applies when writing for these purposes and which tend to pop up automatically when we pick up a pen in a university, are probably unhelpful when writing for our students.

We cannot assume that our students have the background knowledge or ability to follow an argument critically that our academic colleagues possess. Nor will they necessarily have the knack of remembering your arguments, building them into their own knowledge and applying them to the next relevant piece of work they come across. Our academic readership can be assumed to have a specialist's interest in your article, or be searching for material on a specific question, but OU students may have very low motivation to study your particular unit.

The student's approach

On average the student should have about seven hours to spend on your unit, it may help to think of it as one day. What is he likely to do in one day on your unit? Merely to read your 18,500 words once fast, will take the average student about three hours. So, you might expect him to read it twice and maybe underline bits or make a few notes. No time to think.

Now, one week later, what will he have gained from your unit? I suspect not much, certainly not enough to justify all your months of effort.

What would you really like him to get out of your unit?

### Imagine a discussion

Imagine you had that student for one full day in your office, just the two of you, to give him as much as possible of your subject, what would you do?

I guess you'd ask him to read the unit once fast before a late elevenses. Then you'd probably spend the rest of the day discussing it with him. You'd probably raise a series of important topics and ask leading questions to check he was with you in understanding all the main points.

By 5 pm you'd both be exhausted but wouldn't his understanding be different from that previous image of him alone reading your unit twice and then shutting the book and his mind?

So, we've got to translate as much of that exhausting discussion experience as possible into your unit. I suggest you start by listing the topics and questions you would use in discussion.

E.g. Ask for reactions - has it affected the way they think about previous parts of the course?

Ask them to analyse one or two arguments set out in the unit, to compare them on various grounds, to think up criteria for comparing them, to evaluate your list of criteria, to assess the importance of each piece of evidence used, or of each criterion used.

Ask them why they think you dealt with this topic rather than any other, what other ways you might have approached it.

Ask them to sum up what they've got from your unit in terms of important new data, theories, concepts, new ways of thinking etc.

Ask them to raise a few questions - things they'd like to know more about, things they found difficult and want more explanation of, things they hope later units will add to, things they disagree with.

Ask them to express important ideas in their own words, to tell you what they interpret as your line, to define terms in their own words.

Ask them to give you a personal example (or from literature, or news, or imaginary) of some concept you have described in the unit and then see if they can discuss the fit of one of your unit's hypotheses to it.

Ask them to suggest a hypothesis of their own for some phenomena given in the unit or from their own experience.

Ask them what they found most and least interesting and why, what they were surprised by and what they thought obvious.

Ask them about the kinds of explanation you used, the assumptions behind your unit.

Point out two ideas from different parts of your unit and ask them to talk about the implications of each for the other.

Ask them to design a piece of research to test a hypothesis suggested in the text - how would they go about finding out?... or to choose between methods you suggest.

Ask them to compare your approach with that of other unit and off-print authors.

Ask them to review an offprint for consistency, accuracy, etc.

Ask them to evaluate the state of knowledge on your subject and its importance to the real world and to the development of Social Sciences.

Ask them to draw a diagram to represent the relationships of sub-themes in your unit - hierarchies and sideways links, label the links - effects, causes, implications, deductions etc.

Ask them to invent a situation or data which would illustrate one of your hypotheses.

Ask them to list out those bits they think should be committed to memory, agree these with them.

#### Help the student to conduct his own discussion

Most of these ideas for discussion can be used in our distance teaching system, although a few are really only suitable for interactive discussion. Even they are still worth including for use at tutorials, day-schools, in self-help groups or for the student's discussion with an intelligent friend. Help the student by putting the questions in your unit at appropriate intervals and by making any necessary adjustments to the text, e.g. adding clues to assumptions, criteria, cutting out too helpful summaries

The questions should not be numbered but should simply be headed 'Question'. Any answer should follow directly underneath and be headed 'Answer'. Research indicates that although students may 'cheat' more often if this layout is adopted, there is no evidence to suggest that this in any way impairs the learning process. "Stop and think" questions will rarely have answers, but may be followed by your discussion of the point in the main text.

Instructions can be printed in a different colour from the main flow of your writing and can be used to suggest the student breaks off from reading at this point and does something else. This may be to read a separate article, in which case the instructions should say why you want him to read it and may indicate questions to guide his study of it or suggest which are the most and least important parts. Or you may want to suggest that the student should work through a section of the Techniques Manual. Another use for instructions is to present an exercise to enable the student to check his understanding or to practice some skill that you have taught.

Concept labels. You may want to underline important terms the first time that they occur and have them printed in the margin in colour to allow students to find them quickly when revising.

Illustrations of all kinds will be called "Figures". Please indicate their approximate position in the text.

Footnotes should be kept few and brief, as we feel it is a good idea to work points into the text as far as possible and not interrupt the flow of the text. They should on no account be used for indicating book or article references as the adoption of the Harvard style of referencing should make this unnecessary.

## CLOSING CHECKS

At the end of the unit, the course team would like you to help the student to evaluate whether he has got out of the unit all that you would like him to achieve. You could do this by means of a further check-list of objectives or questions, or by referring him back to your opening objectives and key questions.

## ASSESSMENT

Each unit author is also responsible for contributing suggested assessment questions to the course team, at first draft stage. We would like to have ideas for about a dozen short "multiple choice" items for computer marking (CMAs) and for a couple of "essays" to be marked by tutors (TMAs). These should draw on all set materials and refer to a group of units.

## COPYRIGHT

We need plenty of time to arrange any necessary copyright clearance so we really do need to know from the very first draft all the items that you wish to include.

*Judith Riley*

Judith Riley (extn. 3546)

February 1976.

## REFERENCES

- 1 Riley, J. "Discussing and evaluating drafts" and "Assessment", IET internal publications CD3 and CD4, 1978; other titles in preparation.

COURSE DEVELOPMENT GROUP PAPERS

- CD1        NOTES ON THE EARLY STAGES OF COURSE PLANNING  
          by Phillipe Duchastel, Roger Harrison, Euan Henderson,  
          Barbara Hodgson, Adrian Kirkwood, Robert Zimmer.
- CD2        HOW TO USE CONSULTANTS SUCCESSFULLY  
          by Judith Riley
- CD3        DISCUSSING AND EVALUATING DRAFTS  
          by Judith Riley
- CD4        ASSESSMENT  
          by Judith Riley
- CD5        INTRODUCING NEW FACULTY MEMBERS TO COURSE PRODUCTION  
          by Phillipe Duchastel and Roger Harrison
- CD6        BRIDGING THE GAP BETWEEN TEACHING AND LEARNING AT A DISTANCE  
          by Michael Nathenson
- CD7        COLLECTING FEEDBACK DURING COURSE PRESENTATION  
          by Fred Lockwood
- CD8        DESIGNING INSTRUCTIONAL MATERIALS GUESSWORK OR FACTS?  
          by Stephen Brown and Michael Nathenson